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**TO: Economic Support Supervisors
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W-2 Agencies
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Job Center Leads and Managers**

**FROM: Amy Mendel-Clemens
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BEM/DWS OPERATIONS MEMO

No: 05-01

DATE: 01/13/2005

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|------|-------------------------------------|-------|-------------------------------------|--------------------------|-------------------------------------|
| FS | <input checked="" type="checkbox"/> | MA | <input checked="" type="checkbox"/> | SC | <input checked="" type="checkbox"/> |
| CTS | <input type="checkbox"/> | CC | <input checked="" type="checkbox"/> | W-2 | <input checked="" type="checkbox"/> |
| FSET | <input type="checkbox"/> | EA | <input type="checkbox"/> | CF | <input type="checkbox"/> |
| JAL | <input type="checkbox"/> | JC | <input type="checkbox"/> | RAP | <input type="checkbox"/> |
| WIA | <input type="checkbox"/> | Other | EP | <input type="checkbox"/> | ★ |

PRIORITY: HIGH

**SUBJECT: Impact of Master Customer Index on CARES and
The Automatic Update of Date of Death**

EFFECTIVE DATE: January 21, 2005

PURPOSE

This memo describes:

1. The impact of the new Master Customer Index on specific CARES processes (clearance and client registration). Any worker responsible for completing the client registration process in CARES should be made aware of these changes.
2. The automatic update of the Date of Death field on CARES screen ANDA.

BACKGROUND

The Master Customer Index (MCI) was built two years ago to accommodate the exchange of customer information between public assistance systems. It allows multiple systems to share a single point of reference (a unique identifier) for an individual, so that when information about an individual is exchanged, we are sure it is the same individual. Names, dates of birth and social security numbers are not always 100% accurate when they are used independently for this purpose.

The modifications being made to the MCI are necessary to accommodate the design of the CARES Worker Web, which will begin pilot implementation early this spring.

In the next several months, the Department of Health and Human Services will add the Long Term Care Information Access (LTCIA) system to the MCI family of systems. LTCIA is the system where functional eligibility is determined for the home and community-based waiver, Family Care, PACE and Partnership programs. By adding the LTCIA to the MCI, we will be able to automatically update CARES screens that require information from the functional screen (level of care, begin/enrollment date, etc.). This will be possible because we can be sure that the individual in LTCIA is the same individual in CARES. Another memo describing these changes will be issued closer to the Spring 2005 implementation date for LTCIA/CARES interface project.

In the future, systems in the Department of Workforce Development (DWD) will also use MCI to identify individuals. We have and will continue to share information with other Wisconsin public assistance systems to negotiate their participation in the MCI.

IMPACT OF MCI ON CARES PROCESSES

CLEARANCE AND CLIENT REGISTRATION

Effective with this change, CARES clearance will now be processed through the MCI. Once other systems begin using MCI, you may see matches returned on individuals known to MCI (through another program) which are not known to CARES and have no RFA or case number attached to them.

| | | | | | | | | | | |
|------------|-------|------------------------------|--------------|-------------------------|----------------|----------------|----------------|---------------|------------|--|
| CRCR | | INDIVIDUAL CLEARANCE RESULTS | | | | 12/07/04 11:04 | | | | |
| AGENCY: 40 | | RFA | : 0000000000 | | WORKER: XCTG04 | | XCTG04 P KIERN | | | |
| S | FIRST | LAST | SSN | CURR/LAST KNOWN CASE | WORKER | STS | OVP | CLEAR STAT | RSN CDE | |
| | JANIE | ROBERTSON | 555 66 7777 | | | | N | PASS | | |

Other impacts of the MCI on the CARES Clearance process are:

1. When processing an individual through the Clearance in CARES, only the primary name and two other alias/maiden names can be entered (in addition to DOB and SSN). Previously up to six additional names could be entered. It is important that MCI have all other names associated with an individual so if additional alias names are known, they should be entered once the individual has passed clearance.
2. When using an alias/maiden name in Clearance, the primary and the alias/maiden name will display on CRIS/AICL. The worker will only be able to choose the primary name and will need to update CRIR/ANID with the correct primary name and correlating data for the individual to pass clearance.
3. Alias names and SSNs will no longer be created automatically. When an update is made to an existing name or SSN in CARES, the alias screen (CRAL and AIAL) will be displayed so that an alias name or SSN record can be created. If no alias is being created, hit enter to move off the screen.

4. Alias SSNs will no longer be used to match individuals in the Clearance process.

NOTE ➤ Alias SSN/name records created, as a result of typos or data entry errors should be deleted on CRAL/AICL.

5. The following new error message has been created and will be generated when MCI is unable to process a Clearance request, <MCI DID NOT PROCESS THE REQUEST - CALL HELP DESK>. If you receive this message, treat it as a fatal and fax or email a screen print to the CARES Information & Problem Resolution Center. The five-digit code in the bottom right hand corner will assist the Call Center with identifying the problem.

| | | | | | | | | | | | | | | | |
|--|--|-------|--|---------------------------|--|------------|--|----------------|--|--------------|--|----------------|--|---------|--|
| CRIS | | | | INDIVIDUAL CLEARANCE LIST | | | | 11/30/04 10:30 | | | | | | | |
| AGENCY: 40 | | | | RFA : 0000000000 | | | | WORKER: XCTG04 | | | | XCTG04 P KIERN | | | |
| PIN : 0000000000 | | | | | | | | | | | | | | | |
| SSN | | FIRST | | MI | | LAST | | SUF | | DOB | | S | | | |
| 632 01 1101 | | TEST | | | | SEVENEIGHT | | | | 01 01 1961 | | F | | | |
| S | | SSN | | FIRST | | MI | | LAST | | SUF NT | | DOB | | S SCORE | |
| - 000 00 0000 | | TEST | | | | ONETWO | | | | 1 01 01 1961 | | F | | 98 | |
| | | TEST | | | | SEVENEIGHT | | | | 2 | | | | | |
| NEXT TRAN: _____ PARMS: 2700332423_____ | | | | | | | | | | | | | | | |
| BWF - MCI DID NOT PROCESS THE REQUEST - CALL HELP DESK 00036 | | | | | | | | | | | | | | | |

6. CARES screen CRIS will display 6 potential matches; currently it displays 10.
7. CARES Screen ANID will no longer be updated with <*> (SSN is one digit off) or <3> (DOB mismatch). CARES will automatically update the corrected SSN or DOB returned from SSA through the daily SSN validation process. The verification code will be updated to <C> to request validation for the correct SSN. The verification code for the DOB update is <DE>. The following informational alerts will be generated when either the SSN or the DOB is automatically updated on ANID by information received from SSA. These alerts will be sent to the primary worker and the FEP.

Alert 376: INDV SSN HAS BEEN UPDATED

Alert 377: INDV DOB HAS BEEN UPDATED

AUTOMATIC UPDATE OF DATE OF DEATH

In keeping with the Department's goal of reducing workload and in maintaining accurate case records in CARES, the decision was made to automate the process of updating the date of death for deceased (DOD) individuals known to CARES.

CARES PROCESS

Effective January 31, 2005, the DOD will be updated automatically, on CARES screen ANDA, when the DOD is returned from SSA via WTPY. The match process will be run daily and the verification code <DE> will be entered and displayed on ANDA when the system updates the DOD. In addition, the auto-update process will not overlay the DOD if the worker has already entered the date.

The following FYI alert will be generated and sent to the primary worker and the FEP when the DOD has been updated by the system:

Alert 378: INDV DOD HAS BEEN UPDATED

Any case affected will be triggered to run through adverse action (AA) if the worker has not run eligibility on line before then.

INITIAL FILE RUN

The full Bendex file will be run in early February 2005 updating the DOD for those individuals who are known to SSA as deceased but for whom no DOD has been entered into CARES. Because the entire file will be run, you may see an increase in the number alerts generated. We anticipate that since this will also have an impact on mixed SeniorCare cases, you may experience an increase in the amount of contact from the CAPO regarding these cases.

CORRECTING DATE OF DEATH

For instances when the DOD has been updated incorrectly, either through the auto-update process or by a worker it is important to have the information corrected within CARES, MMIS and SSA. Follow the process below to correct the error:

Auto update

- Enter the correct date, if known, to correct CARES,
- Follow the instructions in the [MMIS Guide](#) (edit #143 Resolution) to correct the DOD in MMIS, and
- Contact the CARES Information & Problem Resolution Center to correct the SSA data.

Worker update

- Enter the correct date, if known, to correct CARES.
- Follow the instructions in the [MMIS Guide](#) (edit #143 Resolution) to correct the DOD in MMIS.

NOTE ➤Remember, after manually entering the DOD, do not delete the individual from the case on the same day. CARES must be allowed to transfer information to MMIS overnight, prior to having the individual deleted from the case.

CONTACTS

BHCE CARES Information & Problem Resolution Center